

ASHESI UNIVERSITY COLLEGE

**THE USE OF VISUAL ADVERTISEMENT IN GAINING A
COMPETITIVE ADVANTAGE: A STUDY OF THE
MOBILE TELECOMMUNICATION INDUSTRY IN
GHANA**

By

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DECLARATION

I hereby declare that this dissertation is the result of my own original work and that no part of it has been presented for another degree in this university or elsewhere.

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I hereby declare that the preparation and presentation of the thesis were supervised in accordance with the guidelines on supervision of thesis laid down by Ashesi University College.

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ABSTRACT

The main focus of the study is to find out how mobile telecommunication providers use visual adverts to gain a competitive advantage. To understand visual advertising and how it affects the consumers' choice of mobile phone brand, it is important to examine the mechanisms used to capture the consumers' attention and to understand the specific part of the adverts that appeal to the consumers. The survey results generated useful insights on this subject matter.

Questionnaires to customers and interviews with business executives of some selected companies were also conducted to source the views of how companies use visual advertisement to appeal to customers and gain a competitive advantage. Results indicate that the mechanisms used such as humor, a sense of 'realness' and simplicity are essential variables in attracting and appealing to new and existing customers.

It was realized that even though consumers like simplicity in the visual adverts, they pick on little pieces of detail. It was also realized that when certain advertising mechanisms and techniques are used it appeals to the human psyche and sticks in minds

The study will be useful on the whole for companies who want to reach their consumers via visual advertisement. It is also useful for companies who want to use visual adverts to gain a competitive edge over their competitors. Based on the insightful findings, they will find this project very useful.

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CHAPTER ONE

INTRODUCTION/ OVERVIEW OF THE STUDY

1.1 Background

The telecommunication industry is one of the most prominent and dynamic areas of business in Ghana. The industry is a vital component of Ghana's economic growth in view of the global nature of the world. It makes the rest of the world more accessible to Ghanaians and vice versa. According to the former Minister of Communication, Professor Mike Oquaye, an ICT revolution in the telecommunication industry would 'improve the quality of lives for Ghanaian citizens and alleviate the widespread poverty that seriously undermines human development' AllAfricaGlobalMedia (2006).

Certainly in the last few years, there has been intense competition in the mobile telecommunication industry involving the five major service providers in the telecommunication industry. This competition is likely to be further heightened by the entry of a new Nigerian based mobile phone service provider – GLO, which is anticipated will join the fray before the end of the fourth quarter in 2010. These existing operators employ a variety of marketing strategies with the aim of increasing market share and further enhancing their position in the industry. Ghana's ICT sector regulator show that the number of mobile subscribers has grown exponentially from 7,604,053 subscribers at the beginning of 2008 to 11,302,647 at the end of 2008'.

In this twenty first century, the landscape for marketing has changed drastically especially in this digital era where there is rapid globalization. This makes marketing for the telecommunication companies essential in order to attract new customers and keep existing customers. This increase in globalization not only makes the world a global village where everybody is connected in one way or another, but also changes the use of telecommunication from a much desired "want" to a must-have necessity. Some may argue that the best form of marketing is through advertising because it is all around us in various forms and plays on our senses of vision and hearing in order to appeal to us.

The service providers in the telecommunication industry are operating in a very competitive industry; they therefore make considerable use of advertising as part of their marketing strategy with the aim of attaining a competitive edge and achieving a competitive advantage over their competitors. This study aims at examining the use of visual advertisements on the mobile phone service providers in the telecommunication industry in Ghana in gaining a competitive advantage.

There are currently five major mobile phone service providers operating in Ghana, their brand names are namely, MTN, Tigo, Vodafone, Kasapa and Zain.

MTN was formerly known as Areeba and prior to that was known as Spacefon. The importance of advertisement in the operations of MTN cannot be overstated. The firm actively uses sponsorship as an integral management tool.

Tigo, formerly known as Buzz, is operated by Millicom Ghana Limited. Tigo is most recognized for its innovative commercials which appeal to a wide range of customers, even those who are not yet customers. It uses a catchy jingle 'Express Yourself'.

Vodafone, formerly known as Ghana Telecom was the national telecom company of Ghana. Onetouch was the mobile network service of Ghana Telecom. By Vodafone acquiring majority shares of Ghana Telecom and Onetouch, it has become one of the industry leaders in the Ghanaian market. Vodafone is an established British company with wide exposure in other parts of the world – not just in Ghana.

According to the Ghana Business Index; 'Kasapa Telecom Limited is a subsidiary of Hutchison Whampoa Group. Hutchison Whampoa Group in 1998 acquired 80% of the previously named Celltech Ltd and in 2003, changed the brand to Kasapa Telecom Limited. Kasapa means 'good talk' in Twi, the mostly widely-spoken local language in Ghana. The Kasapa logo incorporates the "nnuweta" or double bell, a widely recognized symbol in Ghanaian culture. The sound made by the nnuweta mimics the pronunciation of the word Kasapa, and is used in advertisements and on the network itself' (Ghana Business Index, 2008)

With the use of the Ghanaian cultural symbol (the nnuweta) and the brand name (Kasapa), it is fair to say that Kasapa's angle is one of patriotism and upholding of Ghanaian cultural values. This is meant to show their pride in being a Ghanaian company and identifying with the Ghanaian culture thus appealing to those who are patriotic.

Zain is the newest entry into the Ghanaian telecom industry. Zain entered the Ghanaian market aggressively in December 2008 with the introduction of the 3G network. The 3G network enables customers to participate in a whole range of activities such as video calling. Within a month, Zain had built up a subscriber base of 267,808. Part of Zain's success booster lay in their innovative 'rollout strategy' – the Zain number reserve initiative (Dogbevi, E 2009). This gave customers the option to choose and reserve any telephone number of their choice. By doing so, Zain was able to communicate their responsibility of value to their customers in enabling customers to have a semblance of number portability.

According to data compiled by the Business and Financial Times, the leading service provider, in terms of subscriptions with a market share is MTN in the increasingly competitive mobile industry in Ghana; here, market leadership is measured in terms of number of subscribers with 52 percent of the market share. Tigo follows with 22 percent, Vodafone follows with 14 percent, Zain has 8 percent and Kasapa has 2 percent (Boah-Mensa, 2020).

According to E. Dogbevi 'A report on telephone lines in Africa shows that mobile phones make up around 90% of all telephone lines in Africa. The report also indicated that presently the growth curves

are beginning to flatten in the continent's more mature markets forcing operators to compete more aggressively on price, quality of service and by introducing new services' (E. Dogbevi, 2009).

It is becoming increasingly clear that the mobile telecommunication sector is rapidly establishing itself as a catalyst for Africa's economic transformation via the use of information and communication technology.

A report by Evans Boah-Mensah taken from the Business and Financial Times states that as of December last year (2009), the total number of SIM card subscribers was 15.1 million. Boah-Mensah also shows readers that data from the country's regulator, National Communications Authority (NCA) shows that more than two thirds of the estimated 25 million Ghanaians have access to telephone services.

The reason why the telecommunication industry is the target sector in this research is because it is one of the most exciting sectors in the country due to the consistent increases in the mobile subscription figures.

1.2 Problem Statement

The mobile telecommunication industry is a very competitive industry. A good way to attract customers is by letting them know what you have to offer and what you can do for them that no other company can. Obviously each company cannot go to every single person and convince them to try what they have to offer, however they can provide visual adverts which can convince and appeal to the consumers.

The main problem is that in this highly competitive industry the companies that provide customers with their networks could do much better when it

comes to visual adverts that stick in the minds of consumers and appeal to them. This study is important so that other phone companies who intend to enter the market will know what strategies to take when they display and show their visual adverts.

1.3 Research Question

How do mobile telecommunication service providers use visual adverts to gain a competitive advantage?

The main research question involves analyzing the different methods of visual advertisement and determining which ones appeal most to consumers. To answer this question, interviews with relevant people involved with the marketing and strategies in the advertising sectors such as the marketing team of each mobile phone service provider will be conducted. Regular customers' opinions and purchasing behaviors, which are influenced by visual adverts will also be examined- after all, the aim of the service providers is to appeal to the human psyche. There are many reasons why each service provider uses different themes, specific promotions and targets particular people, etc in order to gain competitive advantage. The reality is that each service provider has a strategy in which they use to fulfill their aims and objectives and give them an edge over their competitors in order to gain a competitive advantage.

This topic is interesting because it explores how directors of adverts are able to use certain themes, colors, music, voices and people to attract consumers,

stick in the minds of consumers and gain a competitive edge and thus a competitive advantage.

1.4 Research Objectives

The main objective of this study is to investigate how telecommunication companies in Ghana use visual advertisements to create preference for their brands.

More specifically, this study will:

- Investigate whether advertising affects the consumers' choice of mobile phone brand
- Understand the mechanism used to capture the consumers attention
- Understand the specific part of the adverts that appeal to the consumers

To be more specific, the forms of visual advertisement that will be examined are in-print adverts (such as billboards, newspapers, magazines) and television adverts. Visual advertisement can be described as adverts that one can see (and in some cases such as television adverts, hear).

Competitive advantage will be measured using the market share of each company. The company with the greatest market share will be considered as having the greatest competitive advantage and the company with the lowest market share will be considered as having the least competitive advantage. Competitive advantage can be described as 'a set of unique features of a

company and its products that are perceived by the target market as significant and superior to the competition' (Lamb, Hair and McDaniel, 2004).

1.5 Significance of the study

This research is important because:

- It will assist mobile phone service providers to determine the types of advertising that are most effective and the best to use in the future
- It will inform service providers that are yet to enter the market (such as GLO) in their advertising techniques
- It will assist the people in charge of advertisements to determine the best methods and mechanisms to employ to appeal to the human psyche

Sometimes it is the nature of rivalry that makes the competitors use the tactics that they use in order to appeal to their customers; this study should enable competitors to know what advertising strategy or promotions to use to give them the competitive advantage over their rivals.

1.6 Organization of the study

This study is divided into five parts.

Chapter One consists of a brief background, the problem statement, the various research objectives, the significance of the study and the limitations of the study.

Chapter Two focuses on the secondary data compiled from the literature review. This data includes a brief history of advertising, tactics used in

advertising to create a 'competitive edge', criticisms of advertising, impacts of advertising, the importance of investing in advertising to gain a competitive advantage, the role of creativity in advertisements and how creativity leads to a competitive advantage and common executional styles for advertising that can give a competitive edge and advantage.

Chapter Three discusses the methodology of the study, sources of data, mode of data collection, sampling techniques and the questionnaire design.

Chapter Four consists of data analysis, responses to interviews, survey result, an in-depth discussion of the results and the limitations of the study.

Chapter Five provides a summary of findings, conclusions and recommendations based on the results of the study.

CHAPTER 2

LITERATURE REVIEW

The literature review looks at what other authors have researched and written concerning the use of visual advertisement in gaining a competitive advantage over competitors (particularly the mobile telecommunication companies).

2.1 Theoretical framework

The premise of this study is based around the theory of Bagwell (2007), who did a study on the implication of advertising dynamics. In his survey he 'emphasizes the persuasive nature of advertising: its purpose is to alter consumers' tastes for established brand names or company reputations' (Doraszelski, Ulrich, Markovich and Sarit, 2007). This is in line with the study of the use of visual advertisement in gaining a competitive advantage (in Ghana) because they both investigate mechanisms in advertising and implications of advertising dynamics.

2.2 History of advertising

According to an article published by Rulli in 1999 'For centuries, businesses relied chiefly on word-of-mouth advertising - the earliest form of broadcasting and the most practical in a society that was largely illiterate. The ancient Greeks relied upon town criers to run through the villages announcing "by mouth" the arrivals of cargo ships carrying long awaited goods; as early as 1100 AD, innkeepers in France hired town criers to

promote samples of their fine wines' (Rulli 1999). Rulli later talks about how as more and more people became more educated in reading and writing, printed forms of advertisement such as signs, posters and pamphlets became more sensible.

In Ghana, word-of-mouth advertising is still used to advertise for certain companies and the street vendors shout at the top of their voices when they are attempting to sell goods on the roadside.

Relating the history of advertising to the study, when advertising for companies in a highly competitive industry (such as the mobile telecommunication networks), it is necessary to use every form of advertising in order to reach customers and potential customers all over the country

2.3 Advertisement

Advertisement has existed for many centuries dating back to the times when there was only word-of mouth to attract consumers. Today's advertising has a different level of quality and creativity than in the past and takes into consideration the changes in society in order to engage their consumers fully.

Advertisement can be described as a marketing tool used to attract consumers to a particular good or service. According to Ford Huchinson and Rochwell, 'a study conducted on behalf of the Advertising Association indicates that consumers consider anything a brand does in terms of communication to be advertising' (2002). This basically means that any way in which a firm is able to get its message across to its consumers is

considered as advertisement whether it is through radio, internet, television, billboards, magazines or word-of-mouth.

Relating this to the telecommunication industry in Ghana, there are quite a few service providers in the industry competing heavily for the customers in the market, they all use the different methods of advertisement already stated (radio, internet, television, billboards, magazines, etc) in order to invade the lives of the customers. As the years have gone by, the different service providers in Ghana have gotten more and more creative with their jingles, people used in the visual adverts and the voices used on the radio adverts in order to attract customers and stick in the minds of their audience.

In this study, some of the service providers sponsor certain events and appeal to a certain niche through what they have to offer; this is all communicated in the visual adverts produced by each mobile phone service company.

According to Etzel, Walker and Stanton, 'In 2001, total U.S advertising expenditures were over \$231 billion' (Etzel, Walker and Stanton, 2004,p534). This shows how important advertising is as a form as marketing since in just one year \$231 billion was spent on it in just one country.

2.4 Tactics used in advertising to create a 'competitive edge'

Adverts are played and printed by companies with the intention that consumers will acquire more knowledge about the product or service being offered and purchase it ahead of their competitors.

Goodyear (2000) indicates that 'there is an increasing use of exaggeration, symbolism, metaphor, conventions borrowed from other advertising and pastiches of television and cinema styles – all crediting the consumer with increased commercial knowledge and understanding. Moreover advertising increasingly appeals to the emotions rather than the intellect'. Here, Goodyear is able to put the point across that when companies are attempting to promote a good or service they use a variety of tactics to appeal to their audience. By using certain symbolisms, metaphors and exaggeration, it makes an advert unique thus giving it a competitive edge against its competition and thus a competitive advantage.

These tactics are all effective because they grab the audience's attention and make the audience want to see, hear and read more.

According to Kroeber-Riel (1990), advertisement needs to capture the consumer's attention and deliver the message in an original way that will enable the consumer to remember and identify with both the message and the brand.

Taking into consideration that the mobile phone network industry in Ghana is quite competitive each service providers does well with their methods of visual advertising.

2.5 Criticisms of Advertising

According to Shimp (1997), there are several negative impacts advertisement has on society. Some of which include:

- It being untruthful and deceptive, manipulative, offensive and bad in taste
- It creates and perpetuates stereotypes
- It encourages people to buy things that they don't need
- It plays upon fears and insecurities'.

Even though the aim of advertisement is to attract and retain customers, there are some negative effects of it as shown above. In relation to the telecommunication industry, sometimes what is portrayed in the adverts are deceptive. For example, some adverts may promise certain discounts without giving detailed information about the conditions that need to be specified first.

2.6 Impacts and effects of advertising

According to data collected by the CBI (Corporate Branding Index), there is compelling evidence that corporate branding advertising wields power, and its impact is measurable (Gregory, 1998). This data shows that advertisement is good for a firm so that it gains market share.

An article entitled A Study of Measuring Influence of Advertising and Forecasting Cigarette Sales, suggest that 'there is a positive impact between

advertising spending and cigarette consumption' (Yucelt, Uger, Kaynak and Erdener, 1984) . After creating various hypotheses and running a series of regressions, the results demonstrated that advertisement has a positive effect on cigarette consumption. It is a common fact that smoking causes health related diseases and it is very addictive however, even with all these health issues, with the help of advertisement the sale of cigarettes have increased.

This suggests that the more time and effort spent on advertising, the more market share you will get.

Lamb, Hair and McDaniel state in their book entitled *Marketing* that:

'In the television medium alone, researchers estimate that the average viewer watches at least six hours of commercial television messages a week. In addition, that person would be exposed to countless print ads and promotional messages seen in other places' (2004)

This shows that consumers in the United States watch so many hours of television adverts in a week, it is impossible for them not to be influenced by them.

In this book, they also talk about the fact that the type of advert influences the effect it has on consumer:

'For instance, serious dramatic advertisements are more effective at changing consumers' negative attitude. Humorous ads, on the other hand, have been shown to be more effective at shaping attitudes when consumers already have a positive image of the advertised brand. For this reason, beer marketers often use humorous ads to communicate with their core market of young adults'. (2004)

Here, one can see that a lot of thoughts go into what type of adverts to make for certain products and services to appeal to the human psyche.

Due to the fact that television adverts and in-print adverts have a large effect on consumers it is necessary to have adverts. Relating this to the study; there are billboards advertising the phone network brands all over Ghana, in every newspaper and during every commercial on television it is possible to see at least one telecommunication advert. The point of this is to make the consumers aware of what they have to offer.

2.7 Importance of investing in advertising to gain a competitive advantage

James Gregory (a CEO and founder of brand strategy company *Corporate Branding*) conducted a research with his company in the United States of America; the research was to determine whether advertisements affect share prices. This research suggests that advertising not only helps sales but has a positive impact on share prices too. This research also indicated that advertising expenditure is the single biggest contributor to brand image.

Gregory's findings include a separate research undertaken by WCRS and Lehman Bros on behalf of the UK company Orange, which analyzed the contribution of advertising to the success of Orange as a FTSE 100 company. An advertising campaign launched in 1994 through television, radio and newspaper featured the memorable slogan "The future is bright, the future is Orange". Research suggested that the advertising campaign created an earnings payback six times the expenditure. By the end of 1998, the

company's market capitalization had increased to around 10 billion pounds. Much of this further rise is attributed the strength of demand for mobile phones.

Putting this example in the context of the Ghanaian mobile telecommunication industry, one can say that advertisement really helps companies. With heavy advertisement and a memorable, catchy slogan, a company would be able to gain new customers and retain old ones. A catchy slogan in itself can give a company a competitive advantage, just like what happened for Orange.

2.8 Role of creativity in advertisements and how creativity leads to a competitive advantage

Shimp (2003) states that 'effective advertising is usually creative. That is, it is somehow different and out of the ordinary'. He also states that 'advertising that is the same as most other advertising is unable to break through the competitive clutter and grab the consumer's attention'. The examples he gave is that of Holiday Inn, Pepsi-Cola and Budweiser. This is because these adverts appealed to a large number of consumers by making their selling points 'in an entertaining and creative fashion'.

By analyzing Shimp's perspective on the role of creativity in adverts and how creativity leads to a competitive advantage, it is clear that in some sense he agrees with Goodyear (2000) in that it is necessary to make your adverts unique in order for it to appeal to consumers. If the advert is unique in some

way, it will stick in the minds of the consumers and thus give them a competitive edge and advantage.

All the competitors in the industry are competing for the same consumers, so for a company to gain more competitors they must do something different, distinctive and unique that gives them a competitive edge. For this to be possible there must be a lot of creativity.

Putting this in the context of Ghana, it is safe to say that recently when it comes to the mobile service providers' sector, their adverts have become very creative and innovative ranging from people singing and dancing, the use of humorous skits and the use of celebrities featuring in the adverts. All these styles will be discussed further in this essay.

2.9 Common executional styles for advertising that can give a competitive edge/ advantage

In addition to humorous and serious dramatic adverts; Lamb, Hair and McDonald (2004) describe other types of adverts such as 'slice-of-life adverts', which depicts people in normal settings. McDonald's often uses slice-of-life adverts, where people are sitting in various places eating fries. In Ghana, one of the adverts for Indomie instant noodles is depicted in a normal setting where the whole family sit together to eat.

Another common executional style for advertising is 'Lifestyle adverts', which shows how well the product will fit with the consumer's lifestyles. Car adverts such as Volkswagen use 'lifestyle adverts.

The third type according to Lamb, Hair and McDonald is 'spokesperson/ testimonial adverts'. This is where a celebrity, company official, or typical consumer makes a testimonial endorsing the product. This is done a lot concerning consumer products, some of which include hair products and make-up. In the Ghanaian context, UB hair perming cream uses Jackie Appiah (a famous Ghanaian actress) as their 'spokesperson'.

The fourth type according to Lamb, Hair and McDonald is 'Fantasy advertisement'. This creates a fantasy for the viewer built around the product.

The fifth type is 'humorous adverts', advertisers use humor in their ads. This lightens the tone of their adverts. In Ghana, Tigo is known for their humorous adverts.

The sixth type is 'animated product symbols', this is where a character is created that represent the product in advertisements. The Energizer Bunny is a good example of this; it is basically a cartoon bunny that is the character for Duracell batteries.

The seventh type is 'mood/ images adverts', according to Lamb, Hair and McDonald, this is where a mood or image is built around the product such as peace or love. MTN does this a lot in their adverts as it

The eighth type is 'demonstration adverts', this shows consumers the expected benefits involved with using the product. Laundry detergents such

as Omo usually use this type of advert to demonstrate how well their washing detergence work.

The ninth type is 'musical adverts'. This kind of advert basically conveys the message through a song.

The final type according to Lamb, Hair and McDonald is 'scientific adverts'. This is where research and scientific evidence is given so that a brand has superiority over others.

It is evident to see these themes in every single advert within and outside Ghana. Even when it comes to the mobile phone service providers in Ghana it is clear to see some of these themes in the visual adverts.

Zain mostly uses 'mood' adverts, where they convey a mood of "love" and "togetherness" in all their visual adverts.

Kasapa uses simplicity as well as humor, to make some simple adverts and some memorable adverts due to funny sketches in their television adverts. Chris Attoh (a famous Ghanaian actor and television presenter) endorses this network, so to an extent Kasapa uses 'testimonial' advertising.

Vodafone uses 'slice of life', humor and 'testimonials/ spokesperson' television adverts where the billboards and magazines show people doing their everyday activities like braiding hair whilst talking on the phone; and in the television adverts it shows satisfied customers recommending Vodafone.

Tigo uses witty humor in amusing sketches in the television adverts and 'slice of life' adverts in the billboards, where it shows regular people doing ordinary activities like talking with friends.

MTN uses 'mood' in their billboard and magazine adverts to give the feeling of "family" and "togetherness". They also do this in the television adverts.

GLO is yet to appear on the scene, but a few billboards have already been put up with Ghanaian celebrities endorsing them, so it is clear to see they are using 'testimonials/ spokesperson' adverts.

In a nutshell, the literature found all imply that it is necessary to be creative when it comes to advertisement. The more creative the advert is the more it will stay in the minds of the consumers. It is also necessary to place and show the adverts where consumers will see it easily. There are many different executional styles of adverts that appeal to each brand dependant on what image they are trying to portray.

CHAPTER 3

METHODOLOGY

This paper looks at the use of visual advertisement in gaining a competitive advantage in the telecommunication industry in Ghana. The methodology discusses the research tools and the methods of data collection that will be used. It covers the sources, types of data, sample size and questionnaire design. The respondents to the questionnaires were regular customers (found at the Accra Mall) and the telecommunication companies' marketing teams. After communicating with most mobile phone service providers, it is clear that most of the visual adverts are made 'in-house', this means that they do not hire external directors to do their adverts.

3.1 Types of data

Primary data collection will include: Face-to-face interviews and the use of questionnaires distributed to the following groups of people:

- 1) The members of a marketing team responsible for advertisement in each telephone company
- 2) Selected people/ customers about why they use certain networks, what they think of the visual adverts and what attracts them to certain adverts because each company has a theme they use to appeal to and attract customers

The questionnaire included both open-ended and closed-ended questions based on the research objectives.

3.2 Population of sample

The population used in this study is all mobile telephone users and the sample that will be used is mobile phone users in the Accra Mall on a Saturday. The Accra Mall was chosen as a place to distribute the questionnaire because a variety of people of different ages and different backgrounds come from all over Accra to go to the Accra Mall; to be more specific - the Accra Mall food court. The Accra Mall food court was chosen because there the customers were seated and at ease to fill the questionnaire and will not be in a hurry to go anywhere. Convenience sampling was used when collecting data from people at the Accra Mall because it will be at the convenience of the people filling the questionnaire.

The units of analysis will be individual people and companies (Tigo, MTN, Zain, Kasapa and Vodafone).

3.3 Sampling method

Fifty questionnaires were distributed in the Accra mall food court between the hours of 10am and 5pm and 2 interviews were conducted to marketing teams (one from each mobile phone service provider). Of these fifty questionnaires, only 30 of them were filled in.

When interviewing the marketing team, expert sampling will be the best method to use because they have experience and expertise when it comes to

corporate advertising strategy. This is due to the fact that they have been in the industry for a while and they know how and why they choose certain themes for their adverts.

Questionnaires were administered to the people at the Accra Mall and an interview was conducted with the phone service providers' marketing teams. The reason why the marketing teams were be interviewed instead of administering a questionnaire is because due to what their answers are to certain questions it may be necessary to ask more follow up questions. In-depth interviews are usually useful and appropriate for exploratory studies.

3.4 Methods of data collection

Questionnaires and interviews were administered and conducted during this study.

Questionnaires

The reason why questionnaires are appropriate is because when strangers are being interviewed they may perhaps feel intimidated when answering certain questions, and so questionnaires were more appropriate especially since the questionnaires do not have any personal details of the interviewee on it such as name and telephone number. Questionnaires were administered to a variety of people (demographic groups) on what they think gives visual adverts a competitive advantage and what kinds of adverts appeal to them. Age is important to identify because the age of the customer may affect their preference in the network they are choosing and the adverts which appeal to them most.

The questionnaire is comprised of some close-end questions and some open-end questions. The reason it is necessary to have some close-ended questions is because it is easy to compare data from questionnaires when they are close ended questions. The reason why there will be open ended questionnaires is to give people the option to add any additional comments they may want to add. This additional information may be important later in the study.

The reason why the questionnaires will be administered on a Saturday is because people of different ages will be available since it is a weekend, and there is no school or work. The reason why the Accra Mall was chosen is because people of all different ages come from different parts of Accra to purchase goods at the Accra Mall or casually window shop. Because this study addresses visual advertisements it is important that the target audience have access to visual adverts. Presumably, this means they will need to have access to the television. It would be safe to assume that people that patronize the services in the mall would come from a socioeconomic background that would give them access to television sets. It also means that the target audience will need to have access to be mobile and have access to in-print media such as newspapers and billboard

Interviews

It was necessary to interview the marketing teams in charge of the mobile phone service providers' advertisements in person so that they will be free to

add any additional information and make any additional comments that they may not put in a questionnaire.

The marketing team members of two service providers were interviewed in person and asked why they choose to do the advert the way they do and how they think their adverts are unique in that it gives them a competitive advantage over all the other mobile phone service providers. Below are a few examples of interview and questionnaire questions.

Interview questions for members of the marketing team in each company

1. What image are you trying to portray through your visual adverts?
2. According to Lamb, Hair and McDonald (authors of Marketing 2004). There are 10 different types of advert: 1. Slice-of-life, 2. Lifestyle adverts, 3. Spokesperson/ testimonial adverts, 4. Fantasy adverts, 5. Humorous adverts, 6. Animated products symbols, 7. Mood/ images adverts, 8. Demonstrates advert, 9. Musical adverts and 10. Scientific adverts. Which type do you use and why?
3. What gives your visual adverts a competitive edge over your competitors' visual adverts?

Questionnaire questions for customers found at the mall

1. Generally, what television advert from which phone service provider do you remember most?
 - a. Briefly describe this advert
2. Which company uses their adverts to gain the greatest competitive advantage?

3. Generally, which billboard advert from which service provider do you remember most?
 - a. Briefly describe this advert

These are the different sampling methods and styles that will be used to collect the data, the next chapter is data analysis where the results from the interviews and questionnaires will be analyzed and evaluated.

3.5 Scope and limitations

Four potential limitations have been identified: First of all, the study cannot sample every single mobile phone user because that would make the population sample too wide. Secondly, due to budget and distance constraints, the study will be narrowed to Accra. Thirdly, when interviewing people with expertise in a certain area, there may be some biases in their answers in order to make the company they are working for look and sound overly favorable. Finally, not everyone that is approached will be ready and willing to fill in questionnaires.

CHAPTER 4

DATA ANALYSIS

In this chapter, the data collected from previous interviews from the various marketing teams of the mobile phone service providers and questionnaires from people at the mall will be analyzed and discussed.

4.1 Responses from the interviews of the marketing teams

After an interview with a member from the marketing team of Vodafone, he explained that what makes Vodafone unique is that their customers are mainly corporate clients because they provide landline connection, fax machine connections, telefax, mobile phone services and they are the initial providers of internet services. Because of this, they try and make their adverts appeal to the corporate clients. He also explained that Vodafone is the second most 'admired' company in the World (after Walmart) and their values are: Speed, simplicity and trust. So they portray this in everything they do – including their adverts.

After an interview with a member from the marketing team Tigo, he explained that what makes Tigo unique is that they target the youth (those between the ages of 18 and 25), this is because they represent youth, trendiness and adventure. Since everyone wants to be adventurous and youthful this was the right characteristics to have in the company. Subscribers think Tigo has the best call quality, so in the adverts they use this strength to their advantage in their adverts by showing that they have

better call quality than their competitors. He also mentioned that the adverts with the man climbing the tree and cutting the red wire was an intentional stab at MTN and Vodafone and that it is healthy do such competitive things once in a while. He said that there was no point bringing Zain and Kasapa into the rivalry because they are 'small boys' and do not affect their market at all.

It was difficult to get through to MTN, Zain and Kasapa for interviews due to time constraints their marketing team was unavailable to do interviews due to factors such as travelling out of town and being on leave.

4.2 Survey results

A total of 30 questionnaires (See Appendix B for sample questionnaires) were administered at the Accra Mall food court. All the questionnaires were filled representing a 100 percent response rate. Of the 30 questionnaires filled; 20 of the respondents were currently using MTN, 5 were using Tigo, 3 were using Zain, 2 were using Kasapa and none were using Vodafone. (Figure 1).

Figure 1.1 A pie chart to show the networks belonging to customers that filled the questionnaire

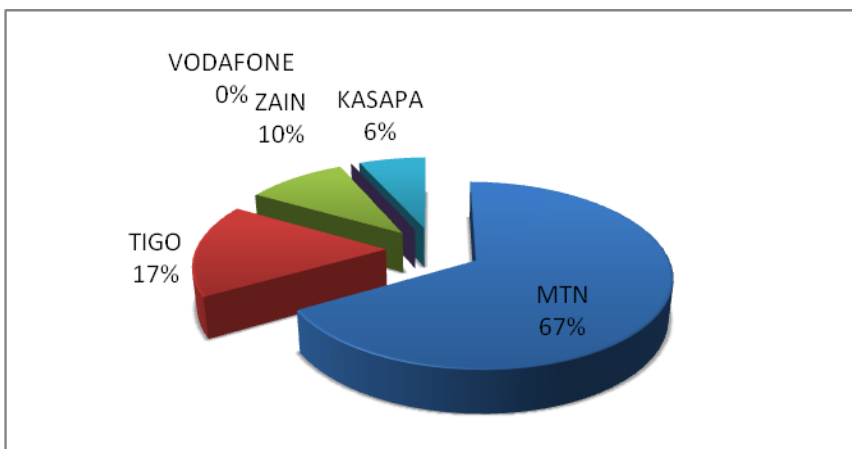


Figure 1 shows that of the people that filled the questionnaire, majority of them were on MTN, followed by Tigo, Kasapa, Zain and Vodafone respectively. Comparing this data to the data compiled by the Business Times (in that the leading service provider, in terms of subscriptions with a market share is MTN in the increasingly competitive mobile industry in Ghana; here, market leadership is measured in terms of number of subscribers with 52 percent of the market share. Tigo follows with 22 percent, Vodafone follows with 14 percent, Zain has 8 percent and Kasapa has 2 percent) it is fairly accurate except in the research conducted in the mall, there was no one who used Vodafone.

Of the 30 questionnaires that were administered to customers at the Accra Mall food court; 3 were below the age of 20, 18 were between the age of 21 and 30, 6 were between the age of 31 and 40, 1 was between the age of 41 and 50 and 2 were above 50 years old. Figure 2 shows the relationship between these figures.

Figure 2 A pie chart to show the percentage range of customers that filled the questionnaire

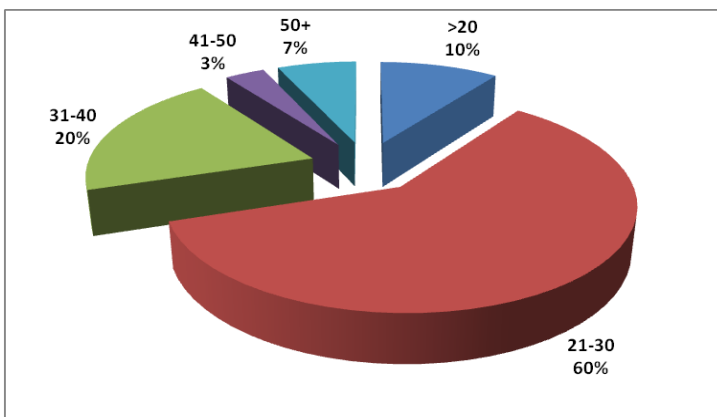
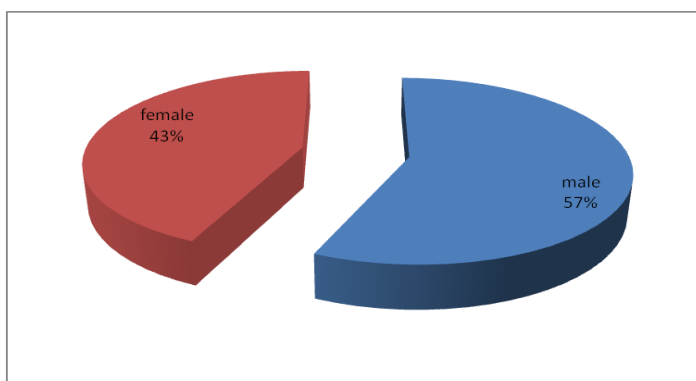


Figure 2 shows the relationship between the number of people who filled the questionnaire and the age range. By looking at Figure 2 it is clear to see that the majority of people who filled the questionnaire were between the ages of 21 and 30. This may be because even though the mall is a place where people of different ages go; majority of people who were above the age of 30 were unwilling to take part in the questionnaire. Also, from observation, most of the people who were around the mall were young people. This is a limitation in the study because age could be an essential variable in the study.

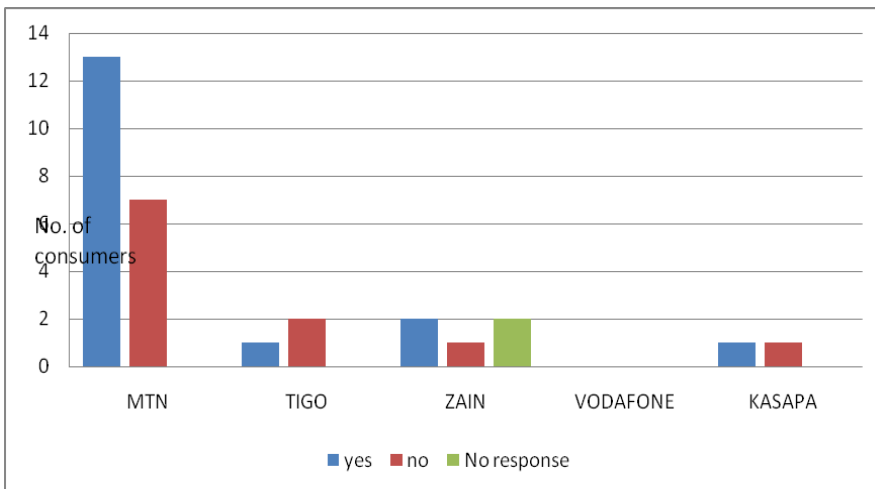
Another variable that could affect the result of preferred adverts could be the gender of the person. So in the questionnaire everyone was required to state what sex they were. Of the 30 people that filled the questionnaire; 17 were male and 13 were female. More males were willing to assist with the questionnaires. The response rate is shown in Figure 3

Figure 3 A pie chart to show the ratio of men to women who participated in the questionnaire



There was also an option on the questionnaire for the respondent to state whether they think that visual adverts affect themselves and consumers in general. This was necessary so that one can observe whether, the consumers themselves think they are directly affected by the visual adverts. Figure 4 shows the responses to this question.

Figure 4 A bar chart to show the comparison of customers' opinion whether they think visual adverts affect themselves and other customers.



By looking at the graph, one can see that it is the people who currently use MTN who feel that adverts affect them and other consumers. The customers who currently use Tigo, Zain and Kasapa feel that they are not significantly affected by adverts.

Demographic profile

There were 30 respondents of the questionnaire, of which 17 were male and 13 were female. Of the 30 respondents 3 were below 20, 18 were between

the age of 21 and 30, 6 were between the age of 31 and 40, 1 was between the age of 41 and 50 and 2 were over 50 years old.

4.2.1 Questionnaire results for television adverts

The questionnaire then moves on to ask which phone networks' television advert is the most memorable. The consumers were asked what television advert from any mobile phone service provider comes to mind. The consumers were made aware that it could be any television advert – old or new. 30 people responded to this question and the results are as follows: 13 people said Vodafone adverts were the most memorable, 8 said Tigo, 4 said Kasapa, 3 said MTN and 2 said Zain.

Figure 5 A pie chart to show the most preferred television advert for the mobile phone service providers

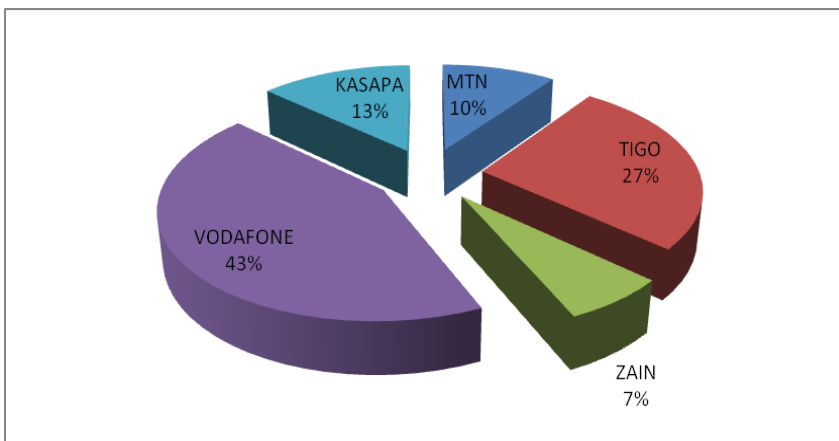


Figure 5 shows that when it comes to television adverts Vodafone is the most memorable one; the questionnaire then gives the respondent the option to specify what advert (what happens in the advert) and give reasons as to why they like it. This is shown in Table 1 found in the appendix

4.2.2 Brief summary of each television advert

When it came to Vodafone, there were 3 adverts that were mentioned: 'Independence Square', 'Kwame Wo Ye Party' and 'She talked'. When it came to Tigo, there were 2 adverts that were mentioned: 'Man cuts red wire' and 'Man climbs tree'. When it came to Zain, there were two adverts that were mentioned: 'Adverts with twin boys' and 'girl sings Malaika'. When it came to Kasapa, 3 adverts were mentioned: 'Wrong number', 'Man invites girlfriend for lunch' and 'Voicemail by Kwame Faakye'. When it came to MTN, 3 adverts were mentioned: 'Boy with Essien on field', 'Woman singing' and 'Let's Go 2010'

VODAFONE

Independence square

This advert displays people in different locations of the world such as the Independence Square in Ghana and a music concert communicating with each other via Vodafone network. The main concept in the advert was to show wherever you are; no matter how much noise is around you, you will still be able to communicate with someone else as long as you use Vodafone.

Kwame Wo Ye Party

This advert shows a young boy having a party while his parents have travelled. His parents call to check on him, he makes sure the room is quiet but someone accidently pops a bottle of Champagne and his mother shouts

'Kwame! Wo Ye Party!'¹ The point of the advert is to show that Vodafone has good sound quality.

'She talked'

This advert shows a woman talking to her husband on the phone and her daughter says her first words over the phone so her father can hear her. The point of this advert is to show that Vodafone has good sound quality

TIGO

Man cuts red wire

This television shows a man in a dilemma about which electricity wire to cut; he calls his friend who tells him 'not the red one' but because the connection is bad he does not hear and he cuts the red wire which results in him cutting off the power supply in the neighborhood and being electrocuted.

Man climbs tree

This advert shows a big man in a red t-shirt trying to talk to his girlfriend on the phone calling her 'honey couchie couchie', but the signal is bad. He looks for signal everywhere but to no avail, he finally climbs a tree to get good signal but falls out of it and end up in hospital and his friends say 'You should have used Tigo'. The purpose of these adverts is to show that if you want good clear reception, Tigo is the network to use.

ZAIN

¹ 'Kwame Wo Ye party?' is Twi for 'Kwame are you having a party?'

Advert with twin boys

This advert shows a mother and child using Zain internet, then a couple on the phone to each other, twin boys and a girl on the beach using her phone. The point of the advert is to show that Zain works for everyone whether it's for a family or individuals it is the network for you.

Girl sing Malaika

This advert shows a young girl who leaves her class to stand in the playground and sing a beautiful song entitled Malaika and all her class mates surround her.

KASAPA

Wrong number

This advert shows a woman answer the phone and talk for hours, after the conversation her husband was impressed that she only talked for two hours (because she usually spends hours on the phone) and she told him it was because it was the wrong number.

Man invites girlfriend to lunch

This television advert shows a man inviting a woman for lunch, and calls his friend for a food recipe and ends up conversing with the friend instead of cooking. The purpose of the Kasapa adverts is to show that they have good value for money. So you can spend a long time talking on the phone and it will not use too much of your credit.

Voicemail by Kwame Faakye

This is a simple advert by Kwame Faakye (a radio presenter in Ghana), where he endorses Kasapa.

MTN

Boy with Essien on field

This advert basically shows a young boy playing football with Michael Essien. Essien is used because MTN is one of the sponsors of Black Stars, the Ghanaian national football team.

Let's go 2010

This advert shows people running in support of the World Cup later this year since MTN is a sponsor of the Black Stars football team

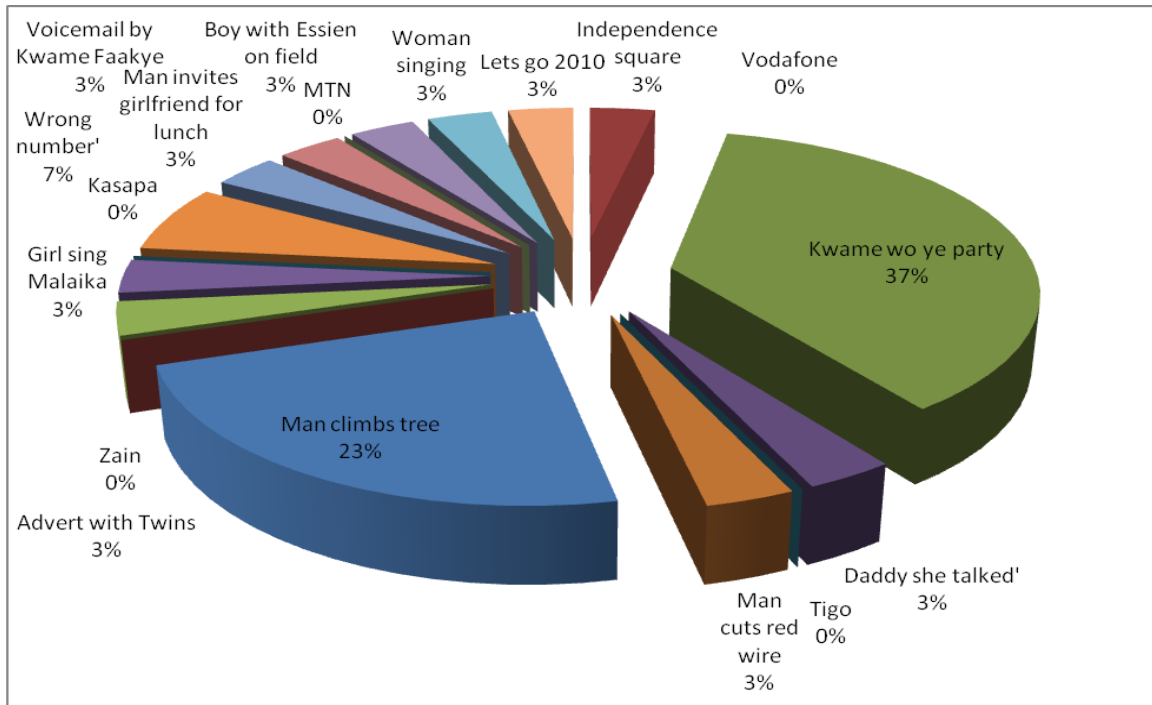
Woman singing

This advert shows a woman singing. It may not be a valid advert because no one else has seen or heard of this advert however the respondent insists that it was an MTN advert

4.3 Analysis of television adverts

By analyzing Table 1 found in the appendix and Figure 6 one can see that Vodafone's 'Kwame Wo Ye Party' advert and Tigo's 'Man climbs the tree' advert are respectively the most popular adverts amongst the 30 respondents who filled the questionnaires

Figure 6 A pie chart to show the consumers' most memorable television adverts

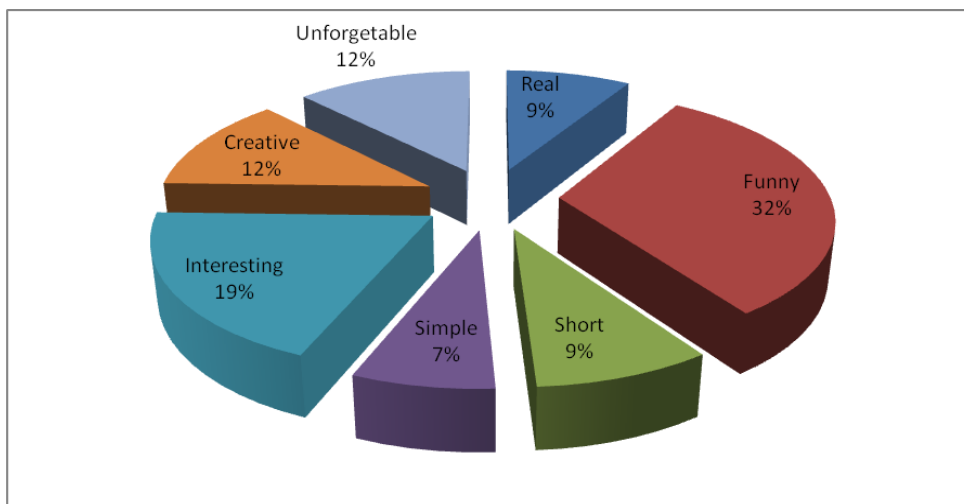


According to Table 1 found in the appendix, one can see that the reason why the Kwame Wo Ye party advert was so popular is because it was funny, short, simple, real, imaginative, creative and unforgettable. The reason why the 'Man climbing the tree' advert was so popular was because it was funny, interesting, unforgettable and creative. If one is to carefully analyze the results gathered in Table 1 found in the appendix, one can say that the variables for a memorable advert are that it should be: funny, interesting, creative, unforgettable, short, real and simple.

It is necessary to have humor in the adverts to lighten the mood of the advert. It is also necessary for the advert to be short and simple because if the advert is long and complicated the consumers will not remember the

purpose of the advert and may even want to change the television channel if the advert does not grab their attention. Also, some people find television adverts that are not 'straight-to-the-point' very annoying. It is necessary for a television advert to be creative, imaginative and unforgettable; this is because if it has these characteristics it will stick in the minds of the consumers. It is necessary for the adverts to be real so that the ordinary consumer can relate to it. Figure 7 shows how important these characteristics are to the respondents of the questionnaire.

Figure 7 A pie chart to show popular characteristics that go into making a memorable advert (according to the survey)



4.4 In-print adverts – (Magazine/ billboard)

Out of the 30 respondents of the questionnaires only 23 filled the part of the questionnaire concerning billboards and magazines. The 7 that did not answer all said that they do not take notice of any of the print adverts for the mobile telecommunication providers.

According to the survey, out of the 23 people that responded, 11 people said they prefer Tigo adverts, 5 say they prefer Vodafone adverts, 5 say they prefer MTN adverts, 1 person said he prefers Zain and 1 person said he prefers Kasapa. This is represented in percentage form in Figure 8

Figure 8 A pie chart to show the percentage of customers that prefer the in-print adverts of the mobile phone providers

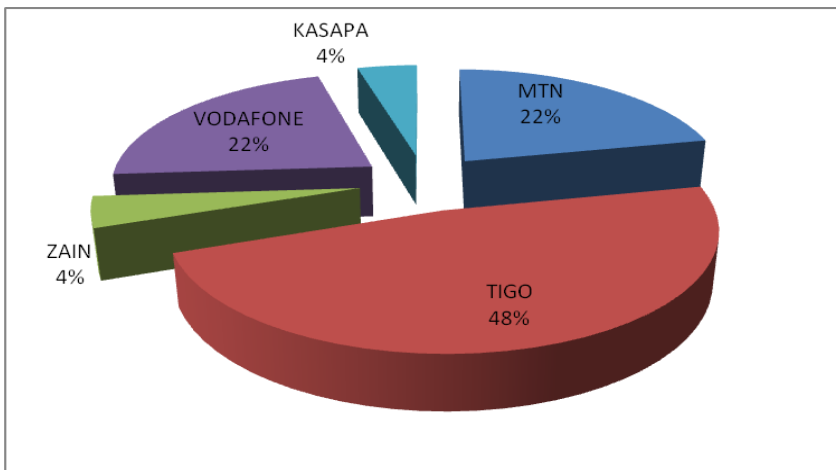


Figure 8 clearly shows that when it comes to in-print adverts Tigo is the most preferred holding 48% when it came to the survey, Vodafone and MTN both had 22% (which is almost half of that of Tigo) and Kasapa and Zain both had 4%

4.4.1 Brief overview of in-print ads

When it came to Vodafone, there were 3 adverts mentioned, when it came to Tigo, there were 2 adverts mentioned. When it came to Kasapa there was 1 advert mentioned. When it came to MTN there were 2 adverts mentioned. When it came to Zain there was 1 advert mentioned.

VODAFONE - 'People cheering football' (shows people having fun watching the football), 'Teeth' (shows a variety of nice teeth smiling) and 'Simple/ orange background' (shows a simple orange background with the word 'Vodadone' in front)

TIGO - 'People posing (youth)' (shows a pretty girl and handsome boy posing together) and 'Man climbs tree' (shows a fat black man climbing a tree holding a phone)

KASAPA - 'A gongon' (shows a green musical instrument with a white background)

MTN - 'Small boy and girl' (shows a cute boy and girl smiling with a bright yellow background) and 'Girl smiling (youth)' (shows a girl smiling with her arms in the air with a bright yellow background)

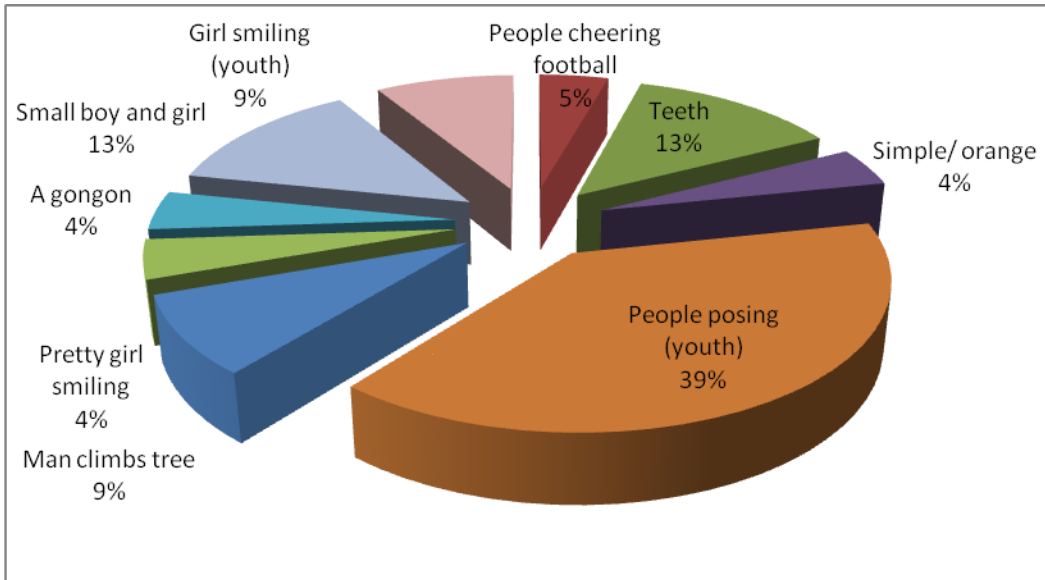
ZAIN - 'Girl smiling' (shows a pretty girl smiling, making the shape of a heart with her hands)

4.5 Analysis of in-print adverts

On analyzing Table 2, one can see that the people posing on the Tigo advert was the most popular, followed by the small girl and boy in the MTN advert and the teeth in the Vodafone advert.

This is depicted in the pie chart in Figure 9

Figure 9 A pie chart to show the specific popular television adverts



When asked what makes the advert appeal to them, they responded giving the following answers: It appeals to me, it is funny, it is real, the people are attractive, the location of the advert is good, nice colours, unforgettable, creative, interesting and simple. The results in percentage form is shown in Figure 10.

Figure 10 A pie chart to show popular characteristics that go into making a memorable in-print advert (results from the questionnaire)

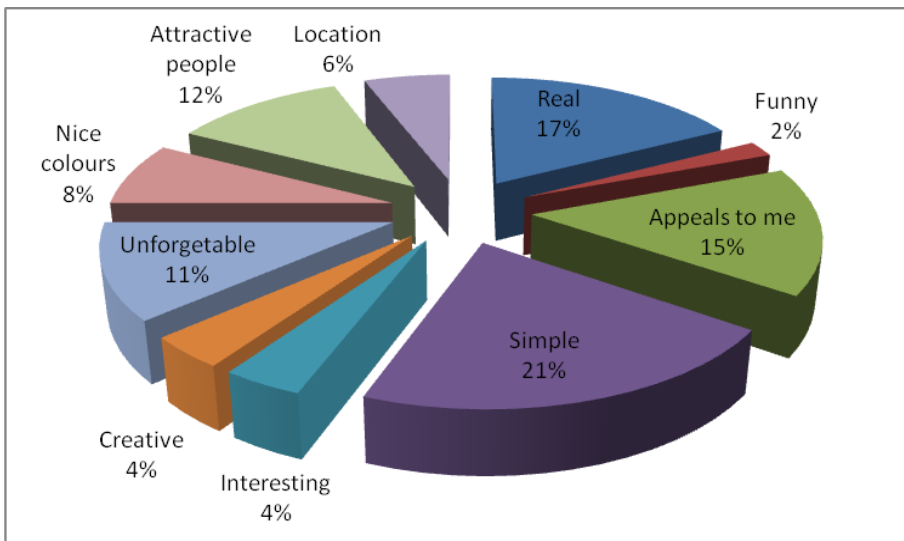


Figure 10 shows that the things that make an advert appeal to them is simplicity and realness. Without these factors consumers cannot really relate to the advert. It is also necessary to have people who are appealing to the eye or that have unforgettable faces so that the image of the person can be in the minds of the consumers. Colour is also important.

4.6 Analysis conclusions

The research question was basically 'How do the mobile telecommunication service providers use visual adverts to gain a competitive advantage?' and the objectives were to investigate how telecommunication companies in Ghana use visual advertisements to create preference for their brands.

More specifically, to:

- Investigate whether advertising affects the consumers' choice of mobile phone brand
- Understand the mechanism used to capture the consumers attention
- Understand the specific part of the adverts that appeal to the consumers

These objectives were met; the first objective was met in that advertisement does not affect the consumers' choice of mobile phone brand however it makes consumers aware of what they should be getting from their service provider and what other competing networks are

offering. The evidence of this is from the data compiled from the questionnaires where the majority of people stated that advertisement does not affect their choice of mobile phone brand. Those that said it does affect their choice said this because it makes them aware of what other options they have.

The second and third objectives were to understand the mechanisms used to capture the consumers and to understand the specific part of the adverts appeal to consumers. These objectives were met. The mechanisms used to capture consumers attention in television adverts is humor, simplicity, creativity and a sense of 'realness'. The mechanisms used to capture consumers' attention in in-print is using people who are appealing to the eye, creativity, slight humor and simplicity. The evidence is shown in that when the customers were asked what appeals to them in in-print adverts and television adverts and the answers stated above are what they said.

In short, the different mechanisms that should be used in television adverts are: It should be short, funny, real, unforgettable, simple, creative and interesting.

The different mechanisms that should be used in in-print adverts are: It should be simplistic, unforgettable, interesting, and creative, have nice colors, use attractive people, have humor and be positioned in a good location.

CHAPTER 5

CONCLUSIONS/ RECOMMENDATIONS

The study sought to find how the mobile telecommunication service providers use visual adverts to gain a competitive advantage. It also sought to investigate whether advertising affects the consumers' choice of mobile phone brand, understand the mechanism used to capture the consumers attention and understand the specific part of the adverts that appeal to the consumers.

5.1 Limitations

There were many limitations of this study. First of all not everybody that was approached was willing to fill the questionnaires. This was a limitation because the sample size could have been much larger but because not everyone was willing to cooperate the sample size was 30. Due to budget and distance constraints the study was narrowed to Accra, this is a limitation because if the study was expanded, the results could have been different. Another limitation is that it was difficult to get hold of the MTN, Zain and Kasapa marketing team so they were left out of the research.

5.2 Findings

Consumers pay attention to detail in adverts; so many consumers when filling the questionnaire mentioned that Tigo uses color to their advantage in their adverts and discredits the colors that represent MTN (yellow) and Vodafone (red) in a tactful way. This is very true in the two Tigo adverts that

were mentioned ('man cuts red wire' and 'man climbs tree') they both discredit the colors red and yellow. The red wire was the one that caused the neighborhood to blackout and electrocuted the man. The man that climbs the tree is wearing a red t-shirt and is unable to get signal in his house and climbs a yellow bus but still doesn't get signal. This could be pure coincidence, however the consumers have picked up on it and have even to an extent agreed that Tigo is right in their adverts because MTN and Vodafone does not give them good quality reception.

When it comes to billboard adverts, it is not always the content of the advert that matters, it is also the location. If the billboard is situated where there is plenty traffic or on a busy road or near a certain landmark it will stick in the consumers' minds.

5.3 Recommendations/ Future studies

This study was significant because it helps future companies know what type of visual advertising technique to take when in a highly competitive market. Future studies that could be done include audio advertising techniques (this would include radio adverts).

It may also be useful if the sample specifically targeted people which have certain demographic features such as age, gender or religion so that one would be able to identify whether it is your age that makes you prefer certain adverts or your gender which makes you dislike certain adverts or your religion that makes you think certain ways about adverts.

5.4 Conclusions

The research showed that even though consumers like simplicity in the visual adverts, they pick on little pieces of detail. It was also realized that when certain advertising mechanisms and techniques are used it appeals to the human psyche and sticks in their minds. The final conclusion that was made is that there are certain variables that go into making a visual advert appealing and thus giving the company that is advertising a competitive advantage. The variables for a television advert are simplicity (the television advert should be short), unforgettable, creative, funny interesting and real. The variables for an in-print advert are that it should be interesting, creative, unforgettable, nice colors, have people that are appealing to the eye and should be put in a location where people will see it.

Without these variables the visual advert will cease to be appealing to the consumers and thus the company cannot gain a competitive advantage through their adverts.

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Appendices

Appendix A

I am a student at Ashesi University, conducting a research on how the different telecommunication companies in Ghana are able to use visual advertisement as a means of gaining a competitive advantage. The interview is for research purposes only. The identity of the person being interviewed will be kept confidential.

N.B. When talking about visual adverts it includes: Television, billboards, newspapers and magazines

1. What company do you work for?

.....

2. What do you think of the visual adverts that your company displays and plays?

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Why?.....

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3. What do you think gives your visual adverts a competitive advantage over your competitor's visual adverts?

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4. What image are you trying to portray through your adverts?

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5. According to Lamb, Hair and McDonald (authors of Marketing 2004). There are 10 different types of advert: 1. Slice-of-life, 2. Lifestyle adverts, 3. Spokesperson/testimonial adverts, 4. Fantasy adverts, 5. Humorous adverts, 6. Animated products

symbols, 7. Mood/ images adverts, 8. Demonstrates advert, 9. Musical adverts and 10. Scientific adverts. Which type do you use?

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Why?.....
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6. Any additional information?

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Appendix B

I am a student at Ashesi University, conducting a research on how the different telecommunication companies in Ghana are able to use visual advertisement as a means of gaining a competitive advantage. This questionnaire is for research purposes only.

1. What network are you currently using? Tigo MTN Zain Kasapa Vodafone

2. If you had a choice, would you change your phone network?Which network would you consider changing to?Why?.....
.....
.....

3. How do you think visual adverts affects your choices as a consumer?.....
.....
.....

4. Have any of the visual adverts affected your choice? If so, how?.....
.....
.....

5.a) Generally what television advert from which phone service provider do you remember most?
.....

5.b) Describe in one or two sentences what happens in the advert.....
.....
.....

5.c) Why do you like this advert?.....
.....
.....

6.a) Generally, which billboard advert from which service provider do you remember most?

.....

6.b) Describe in one or two sentences what you see in the billboard.....

.....
.....
.....

6.c) Why does this billboard appeal to you?

.....
.....
.....

7. Which phone service provider has the most memorable/ best jingle?

why?.....
.....
.....

8.a) Which company uses their adverts to gain the greatest competitive edge and/or advantage?

MTN Tigo Zain Kasapa Vodafone

8.b) How?.....

.....
.....
.....
.....

9. Sex: Male Female

10. Age: Less than 20 21-30 31-40 41-50 50+

11. Do you have any additional information you would like to give us?.....

.....
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List of Tables

Table 1 Reasons why consumers like certain television adverts

	Number	Real	Funny	Short	Simple	Interesting	Creative	Unforgettable
Vodafone								
<i>Independence square</i>	1	1						
<i>Kwame wo ye party</i>	11	2	9	3	3	2	2	1
<i>Daddy she talked'</i>	1			2			1	
Tigo								
<i>Man cuts red wire</i>	1		1					
<i>Man climbs tree</i>	7		5			2	3	4
Zain								
<i>Advert with Twins</i>	1	1				1		
<i>Girl sing Malaika</i>	1					1		
Kasapa								
<i>Wrong number'</i>	2		2			2		2
<i>Man invites girlfriend for lunch</i>	1					1	1	
<i>Voicemail by Kwame Faakye</i>	1				1			
MTN								
<i>Boy with Essien on field</i>	1	1						
<i>Woman singing</i>	1		1			1		
<i>Let's go 2010</i>	1					1		
TOTAL	30	5	18	5	4	11	7	7

Table 2 Reasons why consumers like certain in-print adverts

	Number	Real	Funny	Appeals to me	Simple	Interesting	Creative	Unforgettable	Nice colors	Attractive people	Location
Vodafone											
<i>People cheering football</i>	1	1									
<i>Teeth</i>	3			2				2			1
<i>Simple/ orange</i>	1			1	1				1		
Tigo											
<i>People posing (youth)</i>	9	6		2	5		1	4	1	5	1
<i>Man climbs tree</i>	2		1		1	1	1				
Zain											
<i>Pretty girl smiling</i>	1	1		1	1					1	
Kasapa											
<i>A gongon</i>	1				1						
MTN											
<i>Small boy and girl</i>	3	2		1	1						1
<i>Girl smiling (youth)</i>	2			1	1	1			2		
TOTAL	23	9	1	8	11	2	2	6	4	6	3